

FIG. 2A

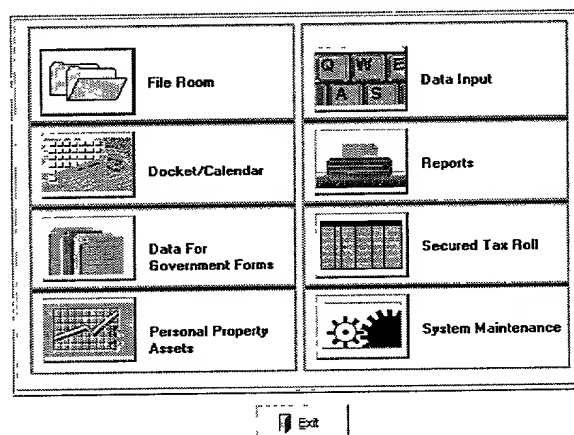


FIG. 2B Main Window

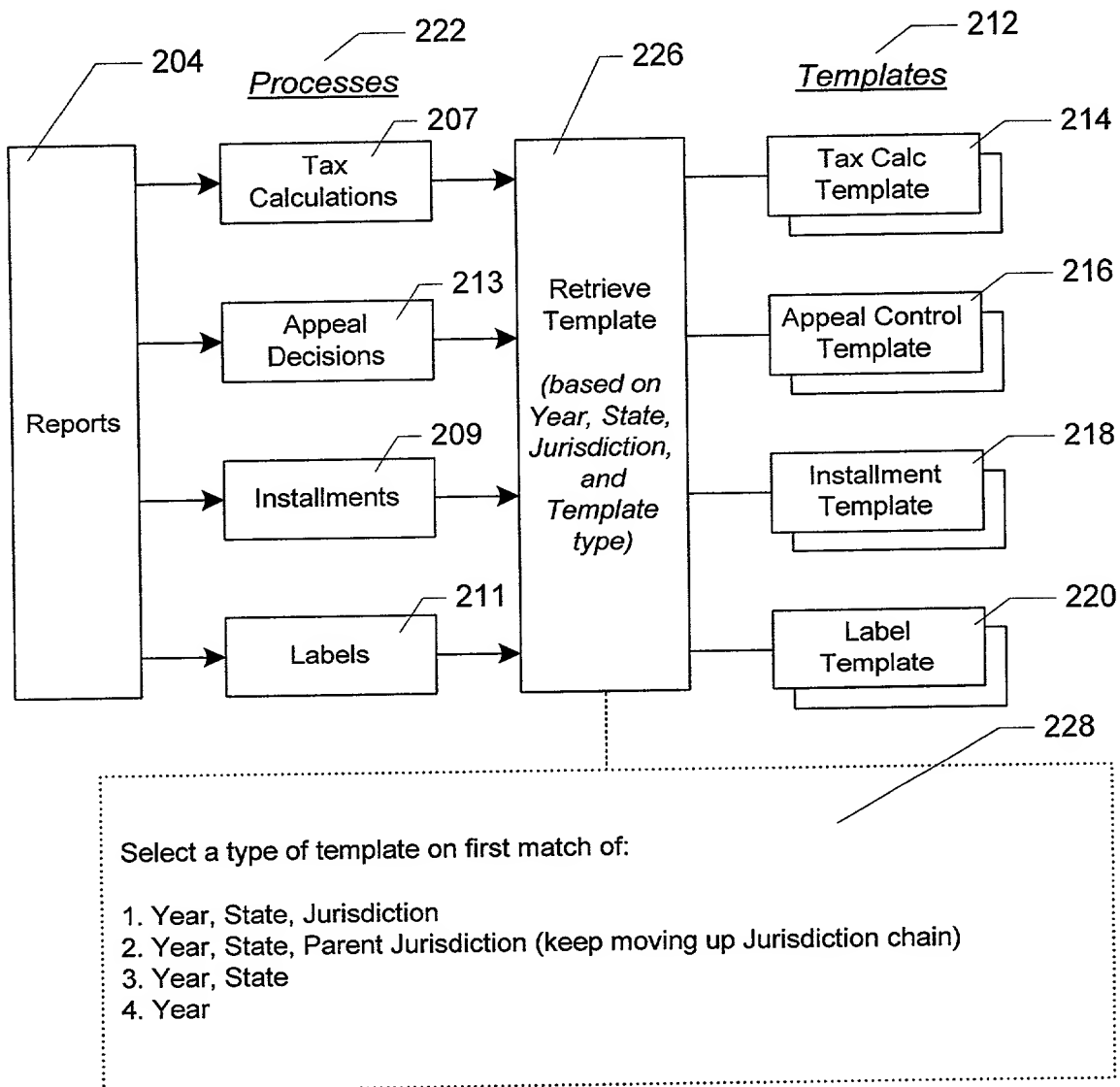


FIG. 3

232 234 254 258 262 264 272

406 236 238 240 242 244 246 248 250 230

Property Maintenance

Other Edit Navigation Save Property Assessment Info Districts Appeals Appeal Process Subpageable Budgets Accounts Payable

Year: 1997 State: AZ Juris Code: MAR Maricopa Client: ? Default Settings

General

Year: 1997 State: AZ Juris Code: MAR Client ID: ? Appeal Juris: ?

Parcel: ? Owner: ? Region: ?

Prop Name: ? City: ? Zip Code: ?

Address: ? Prop ID: ? Vol: ? Prop Cd: ? Use Cd: ?

Valuation

Rate Year: 1997 Val Year: 1996 Rev Cycle: 2

Units: 1 Zoning: ?

Appraisal: ? Appraisal Date: ?

Owner's Opinion: ? Owner's Opinion Date: ?

Purchase: ? Purchase Date: ?

Prior Purchase \$: ? Prior Purchase Date: ?

Lot Rehab Date: ?

Transfer Tax: ? Transfer Rate: ?

Scheduled Closing: ?

Disposal Date: ?

Land

Land: ☐ Acres ☒ Sq Ft

Land Size: 0.000

Improvements

Yr Blt: ? Age: 0 % Comp: 100.0

Imp (Sq Ft): 0

GLA (Sq Ft): 0

Base Value

Base Year: 0000 % Increase: 0.0000

Base Value: 0.00

Notes

Go To Parent Show Templates

Tax Calculation

Combination: ?

Individual: ?

FIG. 4 Parcel Record

280

Calculate Tax On These Jurisdictions

MAR

Add-->

--> Remove

All -->

--> None

282

☒ Individual (Current Property Only)

☐ Combined (Include Subproperties)

☐ Both

OK Cancel ? Help

FIG. 5 Calculate Tax

284

282

752

288

754

286

**Assessment Track**

Type: ☒ RE ☐ FP ☐ SUP ☐ NAV

Track ID: 1

Tax Bill: N25

Tax Bill Amt: 0.00

☒ Plug Tax Rate ☐ Projected

FCV Rate: 0.100000

LPV Rate: 0.052680

Eq Ratio: 1.00000

☐ This is a Photata Track

This track supercedes: [dropdown]

Un: [dropdown]

Descr: [text area]

☒ Include Assessment

**Assessment Detail**

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount
Interim	900,000	720,000	400,000	500,000	109,929.60

Change Order: [dropdown] Move Up Move Down

Projected values are marked with an asterisk (\*)

Subtype: Interim Class: 5 ☐ Protected?

Actual Value		Land		Improvements	
FCV:	900,000		500,000		400,000
Asd FCV	720,000		400,000		320,000
LPV:	900,000		Asd LPV:	720,000	

FCV Ratio: 80.000000

FCV Imp Ratio: ?

LPV Ratio: 80.000000

FIG. 6 Assessments

292

290

**Districts**

Juns Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdiction: [dropdown]

Dist Code: 031600

Class: 8

FCV Rate: 0.037028

LPV Rate: 0.102171

Rate Year: 1997

☐ Special District

Type: [dropdown]

Amount: ?

FIG. 7 Districts

296 298 284 294

300

Appeal Billing

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPHDP	PP1	No		
A REAL	1	No	No	

A Tracks With Appeal Activity

Appeal Record

Appeal #:  File #:  Billing#:  Date Created: 12/28/98

Appeal Ref:  Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons:  Status:

Responsible Professional:  ☒ Allocated?

Working Professional:  ☐ Consultant Engaged

Consultant:

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

FIG. 8 Appeal Record

296 298 302

304

Appeal Billing

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Billing Information

Fee Agreement #1			Fee Agreement #2		Fee Agreement #3	
Billing Type	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount
Contingency	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:			Form:		Form:	

☐ Multiple Years Final Year:

Referral

Firm:  Contact:

☒ Contingency ☐ Flat Fee Amount:

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Level: 1 Hearing: 1

Tax Amount: 1,000.00

Calc Tax Amount: ?

Appeal Level: 1 Hearing: 1

Appeal #: 3001 Class: 5

☒ File Appeal ☐ Outside Appeal

☐ Litigation ☐ Skip Level

Requested	Actual Value	Land	Improvements	Date	Time
Requested FdV: 9,000	90,000	20,000	70,000	Filing Deadline: 12/01/97	12:00 PM
Requested Asd FdV: 900	90,000	20,000	70,000	Date Filed: 11/30/97	09:00 AM
FDV Ratio: 10.00000000	100.00000000		FDV Imp Ratio: ?	Hearing: 01/20/97	02:00 PM
Requested LPV: 8,000	89,000		Requested LPV Ratio: 99.00000000	Decision: 02/19/98	04:00 AM
Requested Asd LPV: 7,920	89,000		Actual LPV Ratio: 100.00000000		

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	absolving
000-00-0006	Pati's Property	Just a really big property.

Switch To Subparcel..

Parcel: --

FIG. 11 Subparcels

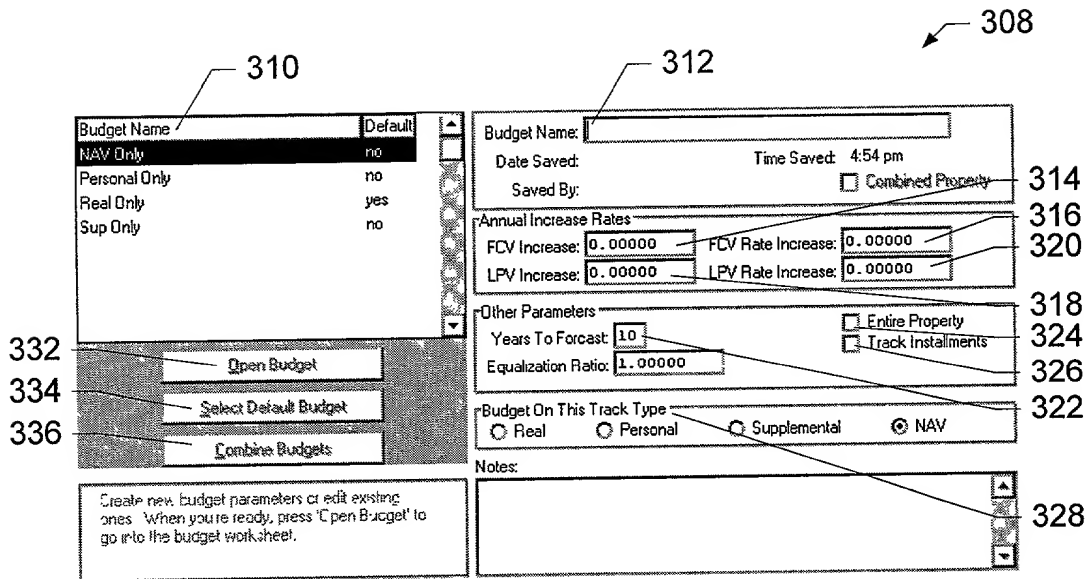


Diagram of the 'Create Budgets' window. The window is divided into several sections. On the left, a list of budget types (NAV Only, Personal Only, Real Only, Sup Only) is shown with a 'Default' column. Below this are buttons for 'Open Budget', 'Select Default Budget', and 'Combine Budgets'. On the right, there are input fields for 'Budget Name', 'Date Saved', 'Time Saved', and 'Saved By'. Below these are checkboxes for 'Combined Property', 'Entire Property', and 'Track Installments'. There are also input fields for 'Annual Increase Rates' (FCV Increase, FCV Rate Increase, LPV Increase, LPV Rate Increase) and 'Other Parameters' (Years To Forecast, Equalization Ratio). At the bottom, there are radio buttons for 'Budget On This Track Type' (Real, Personal, Supplemental, NAV) and a 'Notes' section.

310 Budget Name: Default

312 Budget Name: [Input Field]

314 Date Saved: [Input Field] Time Saved: 4:54 pm

316 Saved By: [Input Field] ☐ Combined Property

320 Annual Increase Rates

318 FCV Increase: 0.00000 FCV Rate Increase: 0.00000

324 LPV Increase: 0.00000 LPV Rate Increase: 0.00000

326 Other Parameters

322 Years To Forecast: 10 ☐ Entire Property

Equalization Ratio: 1.00000 ☐ Track Installments

Budget On This Track Type

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

Notes: [Input Field]

332 Open Budget

334 Select Default Budget

336 Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.

FIG. 12 Create Budgets

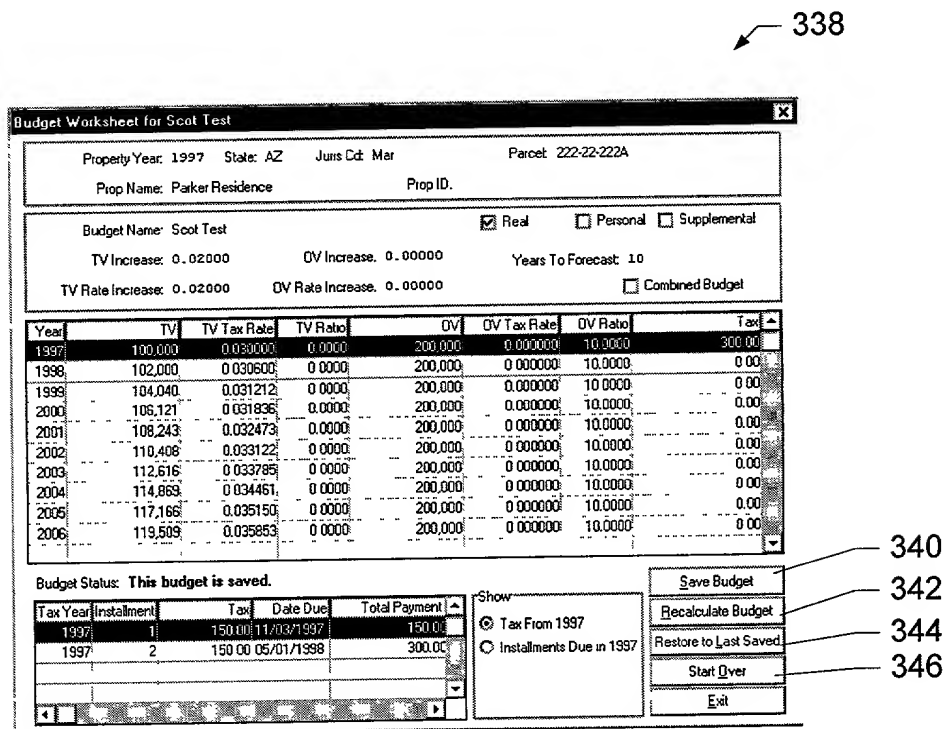


Diagram of the 'Budget Worksheet for Scot Test' window. The window displays property information (Property Year, State, Juris, Parcel, Prop Name, Prop ID), budget parameters (Budget Name, Real/Personal/Supplemental, TV Increase, OV Increase, Years To Forecast, TV Rate Increase, OV Rate Increase, Combined Budget), and a table of tax data. The table has columns for Year, TV, TV Tax Rate, TV Ratio, OV, OV Tax Rate, OV Ratio, and Tax. Below the table, there is a 'Budget Status' section indicating 'This budget is saved.' and a 'Show' section with radio buttons for 'Tax From 1997' and 'Installments Due in 1997'. On the right, there are buttons for 'Save Budget', 'Recalculate Budget', 'Restore to Last Saved', 'Start Over', and 'Exit'.

Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID: [Input Field]

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033789	0.0000	200,000	0.000000	10.0000	0.00
2004	114,863	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show

☒ Tax From 1997 ☐ Installments Due in 1997

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

FIG. 13 Budget Worksheet

348

IR	Required Date	Payee	Asmt Type	Track ID	Tax Bill#	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP36163135165165	25,000.00	0.00	25,000.00	07/01/97
1	11/03/97	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	07/01/97
2	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types	<input checked="" type="radio"/> Real	<input type="radio"/> Supplemental	<input type="radio"/> Personal Property	<input type="radio"/> NAV	Track ID:	1	Chrg Less Disc	130,929.60
Installment:	0	<input type="checkbox"/> Estimate?	Payee:	AZ-MARICOPA-T			Payments:	130,929.60
Tax Bill#	?	Chk Req #	0	Check Num	0		Balance to Pay:	0.00
							Unpaid Amt:	0.00
		Charges	Discount	Payments				
Date:								
Principal:		0.00	0.00	0.00	Status	Released		
Penalty:		0.00		0.00	Auto Add			
Interest:		0.00		0.00	Entry Date			
Notes Other:		0.00		0.00	Mailed Date:			

350

FIG. 14 Accounts Payable

352

Auto Add	
<input checked="" type="checkbox"/> A/P Entries	
<input checked="" type="checkbox"/> Divide into Installments <input checked="" type="checkbox"/> Include Discounts <input checked="" type="checkbox"/> Include Payments <input type="checkbox"/> Skip Tracks Already Brought Over	
<input checked="" type="checkbox"/> Track Types <input checked="" type="checkbox"/> Real <input type="checkbox"/> Supplemental <input checked="" type="checkbox"/> Personal <input type="checkbox"/> NAV	
This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.	
This jurisdiction is getting its rules from:	
Arizona (Real) Arizona (Personal)	

FIG. 15 Auto Add

260 366 354

Client ID	Name	Active?
2802	HUNTER'S GLEN APARTMENTS	Y
2803	LIBERTY II LP	Y
2804	FIRST UNION REAL ESTATE EQUITY	Y
2805	RON SHOFFET	Y
2806	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Partners	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Merritt	Y

Client ID. 1001

368

356

Client ID: 9998 Client Name: Ashley Eleanor Merritt Client #: 9998 Billing #: 9998 Contacts

Type: Client SubType: Current Responsible Attorney: Rich J. Truly

358

Address: 8000 N. Barney Lane Notes:

Mailing Address: P. O. Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarali.com

Phone: 602-900-9998 Extension: Active: Y

360

362

Fax: 602-900-9997 Region: Referral ID: 9998 Referring Individual: Path Naccarali Referral Terms: 364

FIG. 16 Address Information

370

372 454 452 456 490

Contact Maintenance

Indv ID	Full Name
1	Jackie D. Quinn

Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

☐ Address is Same as Client

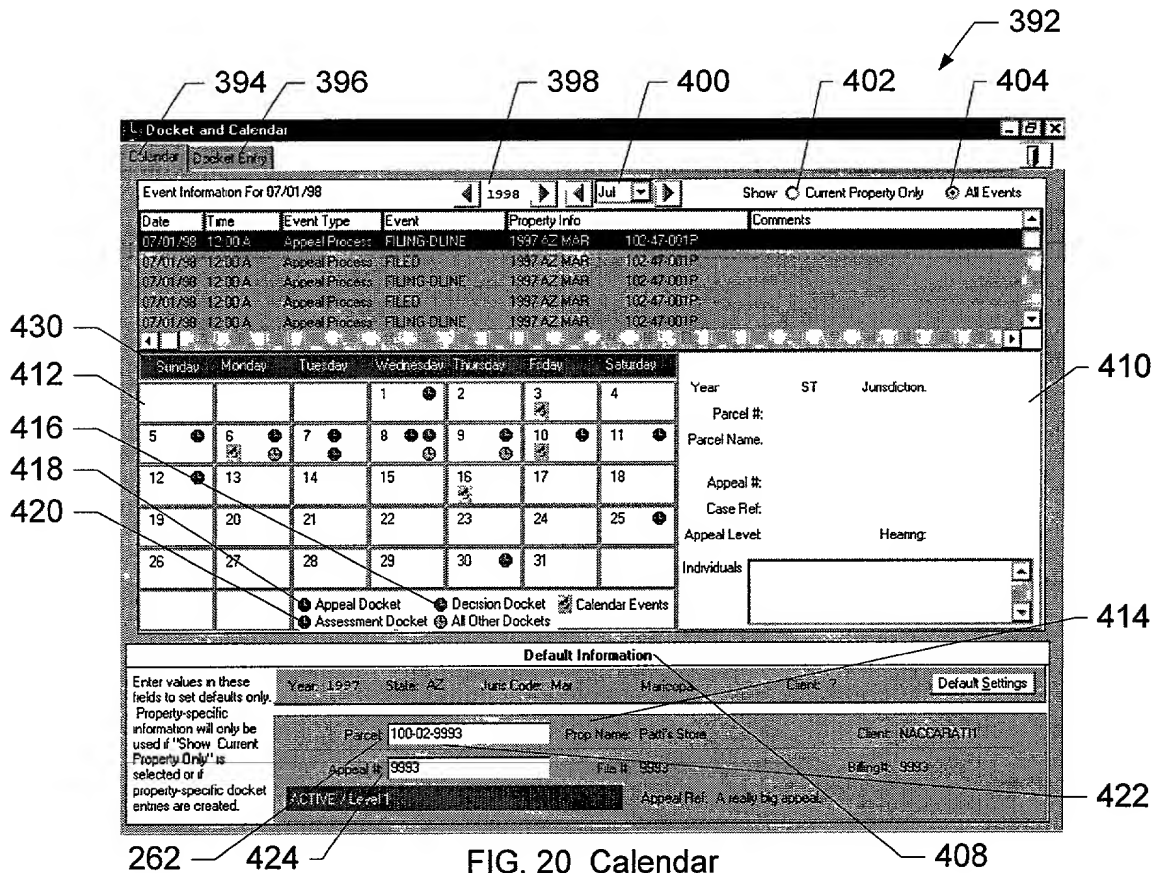
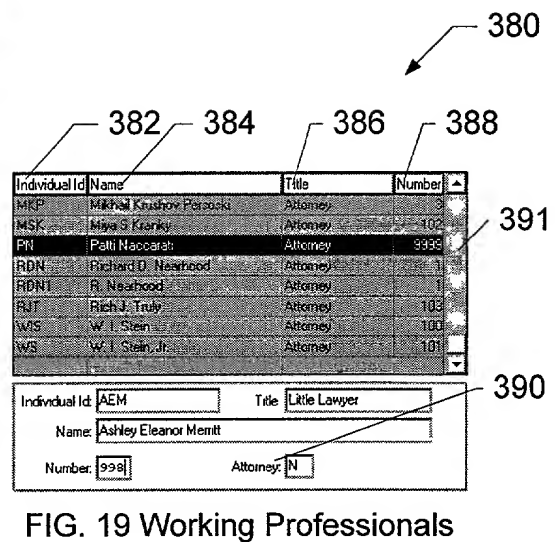
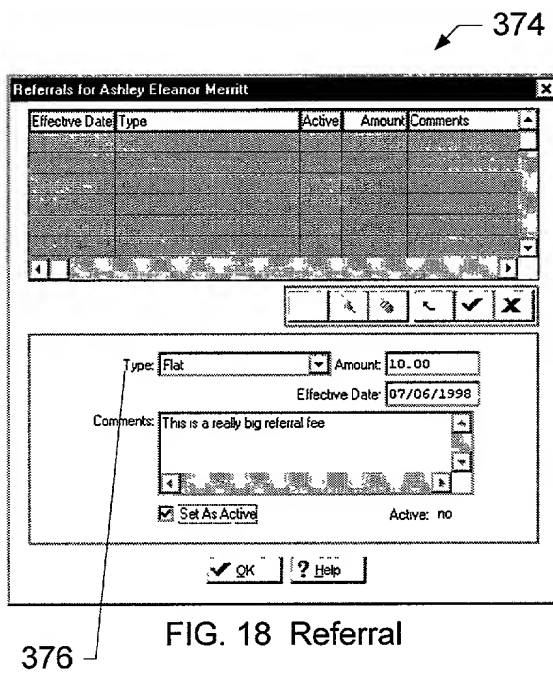
Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

371

FIG. 17 Contacts



394 396 452 454 456 430

450 432 436 434 438 440 439 408 256

**Docket and Calendar**

Expand Docket Entry

☒ Show Dockets for Current Property Only
 ☐ Show Only Dockets of Type: Assessment

Date	Time	Type	Event Code
07/12/1998	12:00 PM	Appeal Process	Appeal PROCE
07/13/1998	12:00 PM	Appeal Process	HEARING
07/16/1998	12:00 PM	Appeal Process	FILED
07/19/1998	12:00 PM	Appeal Process	FILING-DLINE

Type: Appeal Process Event: Appeal Process  
 Date: 07/12/1998 Time: 12:00 PM  
 Appeal Level: 1 Hearing: 1 State: Jurisdiction:

Individuals Involved: Attn. Mr. Stan Manna, MSK  
 JAB, Jeffrey A. Brown

Comments

Docketed To This Property 1997 AZ Mar 100-02-9993

**Default Information**

Enter values in these fields to set defaults only. Property-specific information will only be used if "Show Current Property Only" is selected or if property-specific docket entries are created.

Year: 1997 State: AZ Juris Code: Mar Mailbox: Client: 2 Default Settings

Parcel: 100-02-9993 Prop Name: Park's Store Client: NACCARATI  
 Appeal #: 9993 File #: 9993 Billing #: 9993  
 ACTIVE / Level 1 Appeal Ret: A really big appeal

262 424

FIG. 21 Docket Entry

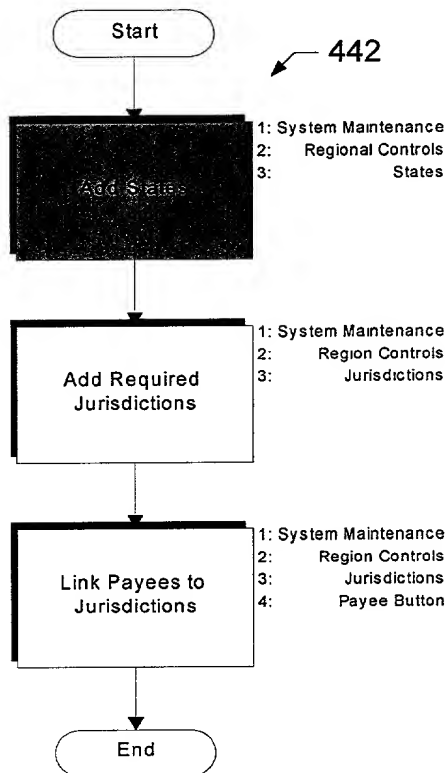


FIG. 22 Creating States and Jurisdictions

444 446 448

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

State Code: AK State: Alaska

FIG. 23 State Set Up

406

458

234

Jurisdiction Maintenance

File Edit Navigation Save

1. Select a state

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

2. Select a jurisdiction

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
COC	Coconino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRF	Greenlee	1995	

Sub-Jurisdictions:

Juns Code	Juris Name

Show Parent Jurisdictions Only

State: AZ Juris Cd: Juris Name:

Rate Year: 0

Parent Juris Code: Parcel Format: Default Payee ID: 2

Payees Show Territories

FIG. 24 Jurisdiction Set Up

476

486

406

452

456

490

478

492

482

480

Payees for MAR/AZ

Payee ID: Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual:

Notes:

Contact: Referral Term:

FIG. 25 Jurisdiction Payee

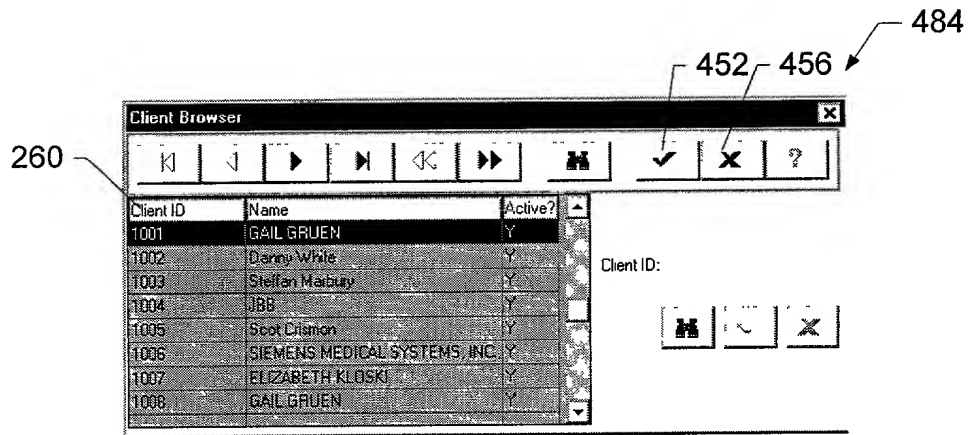


FIG. 26 Client Browser

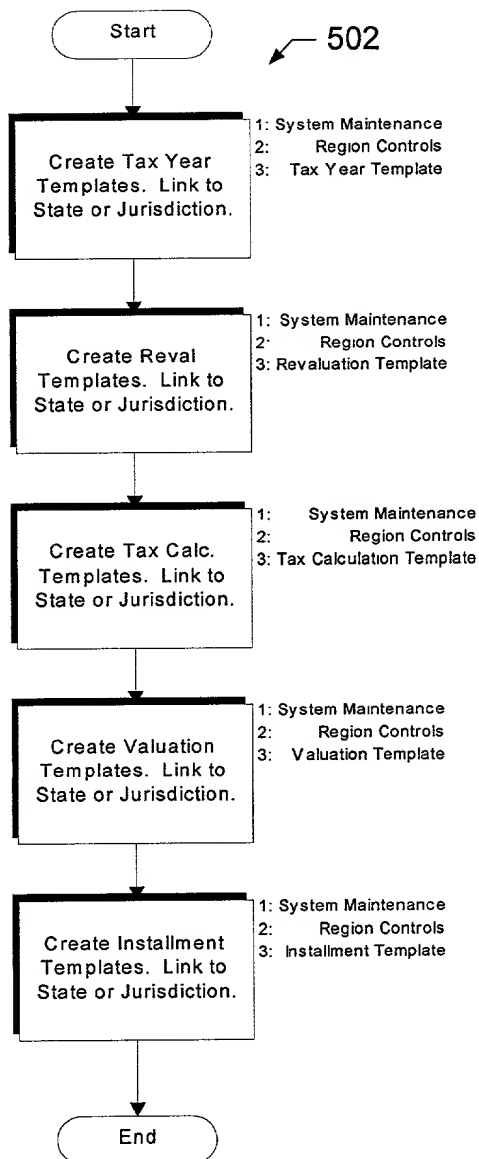
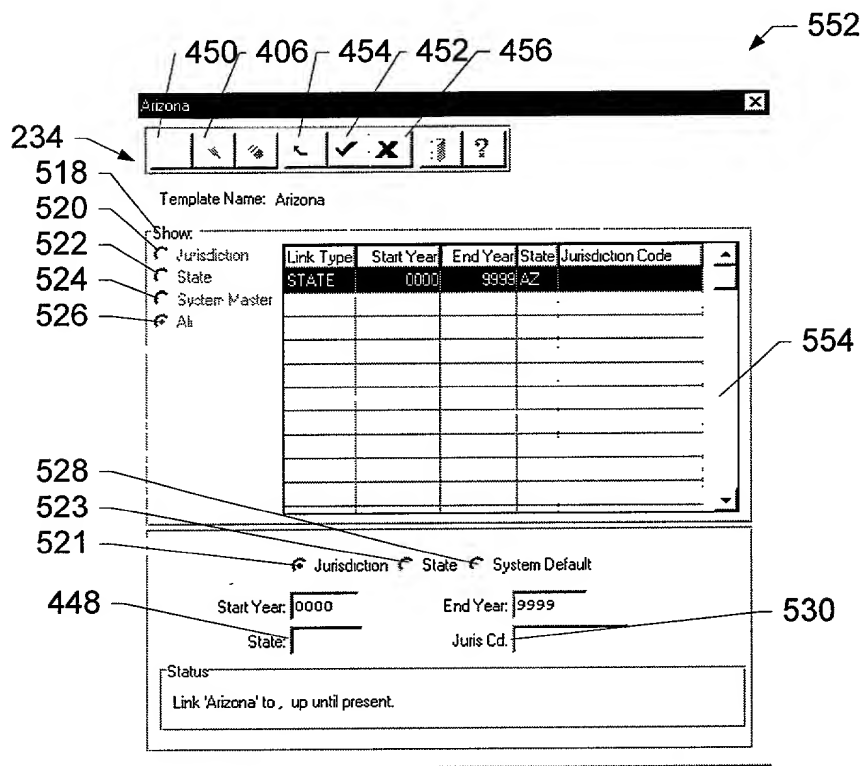
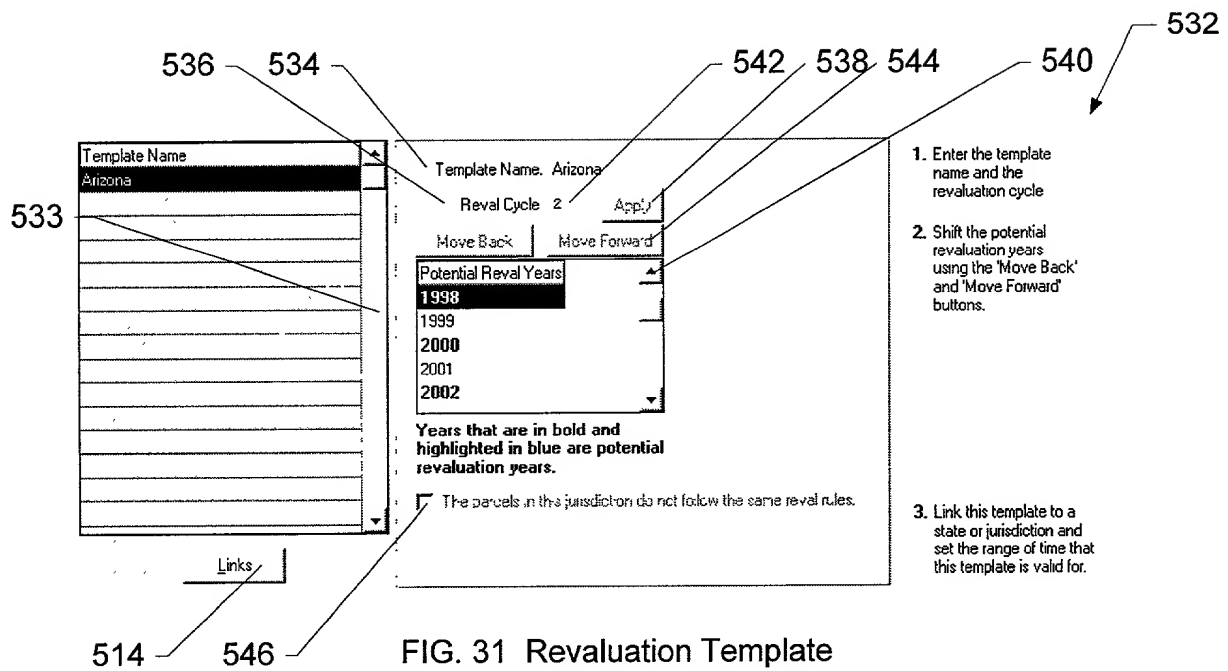


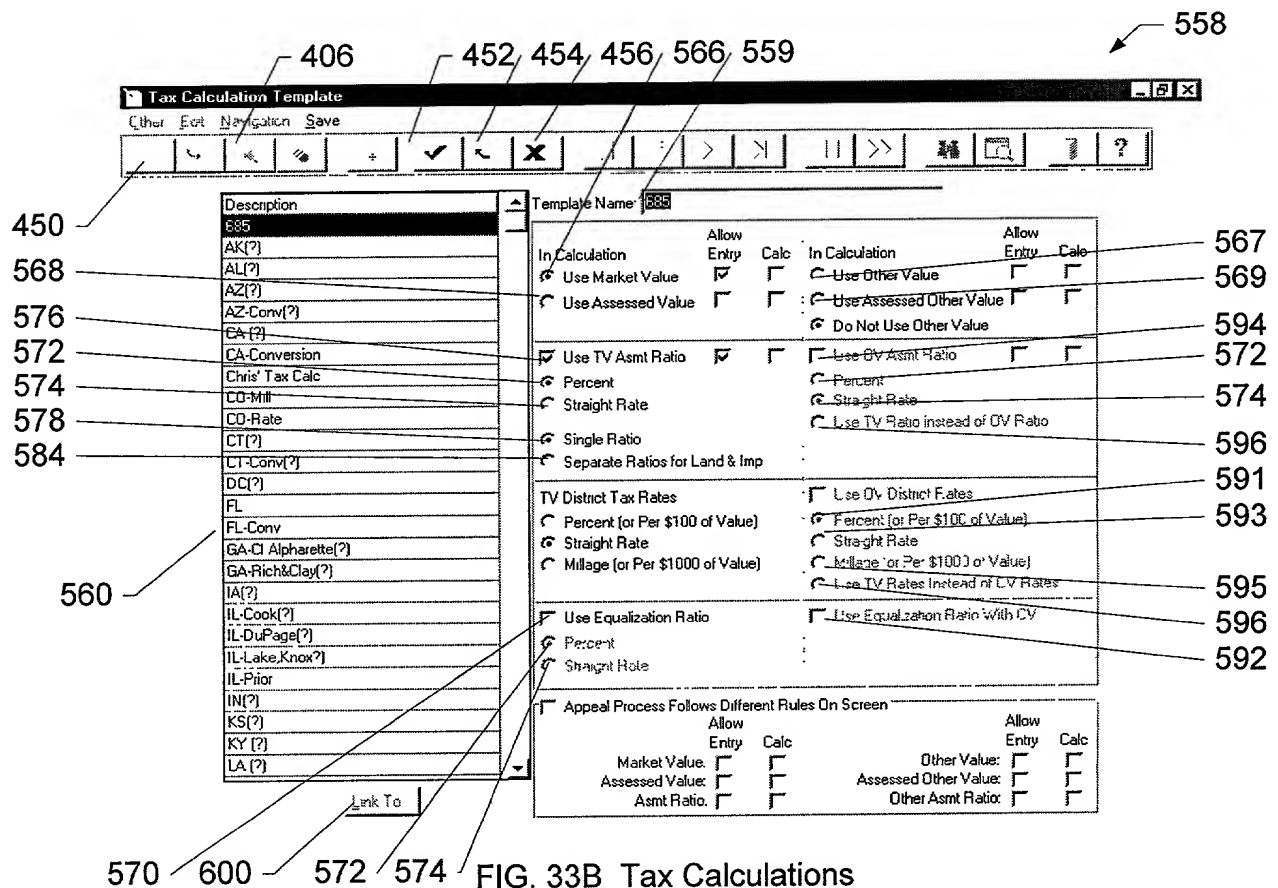
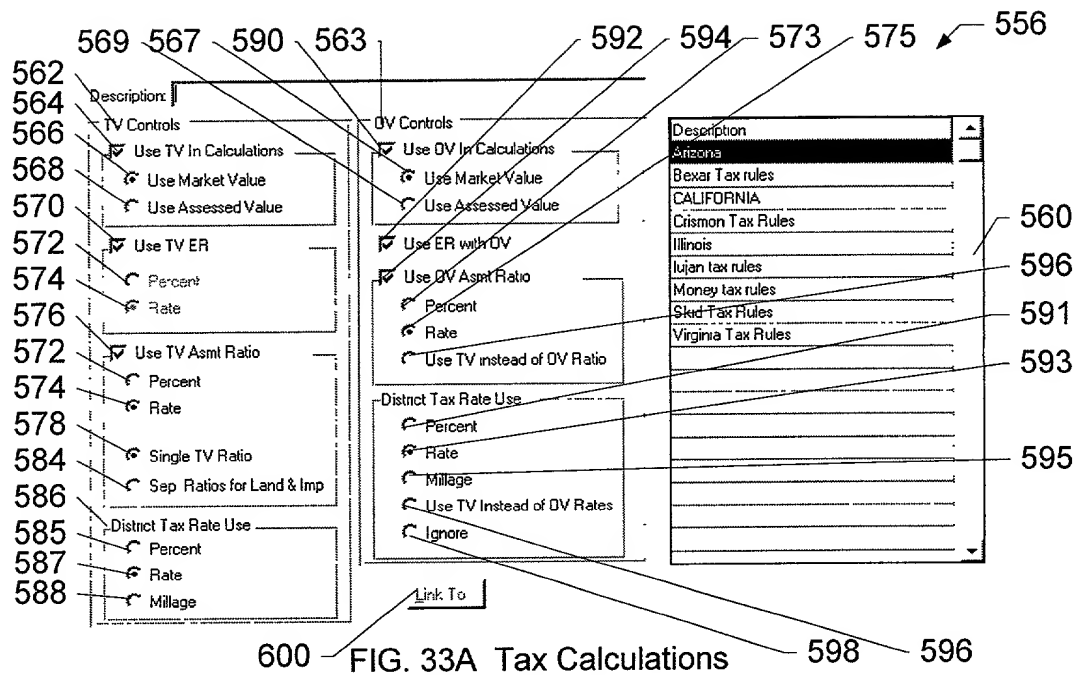
FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

FIG. 30 Templates by Year





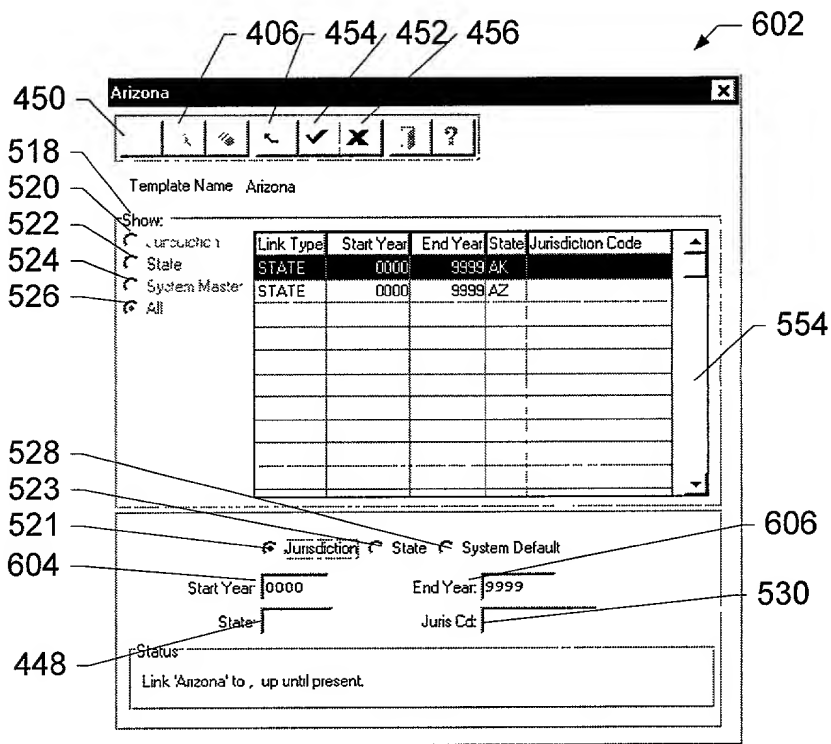


FIG. 34 Tax Calculation Link To

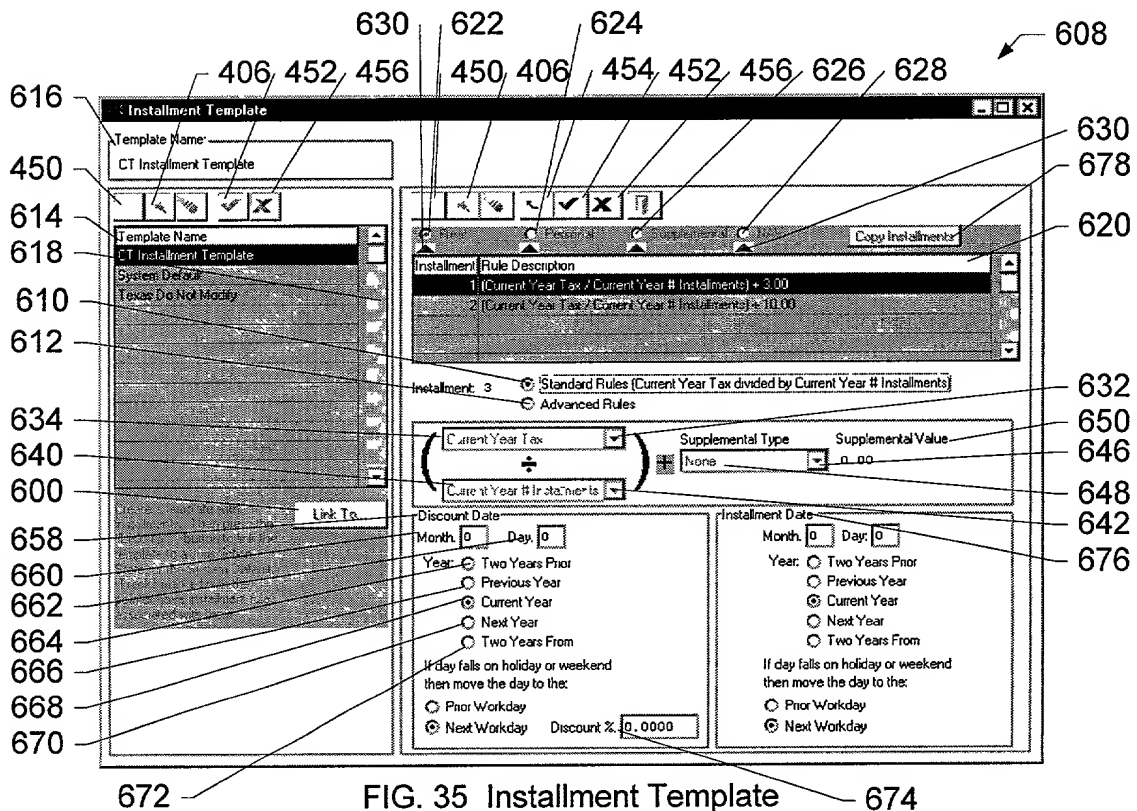


FIG. 35 Installment Template

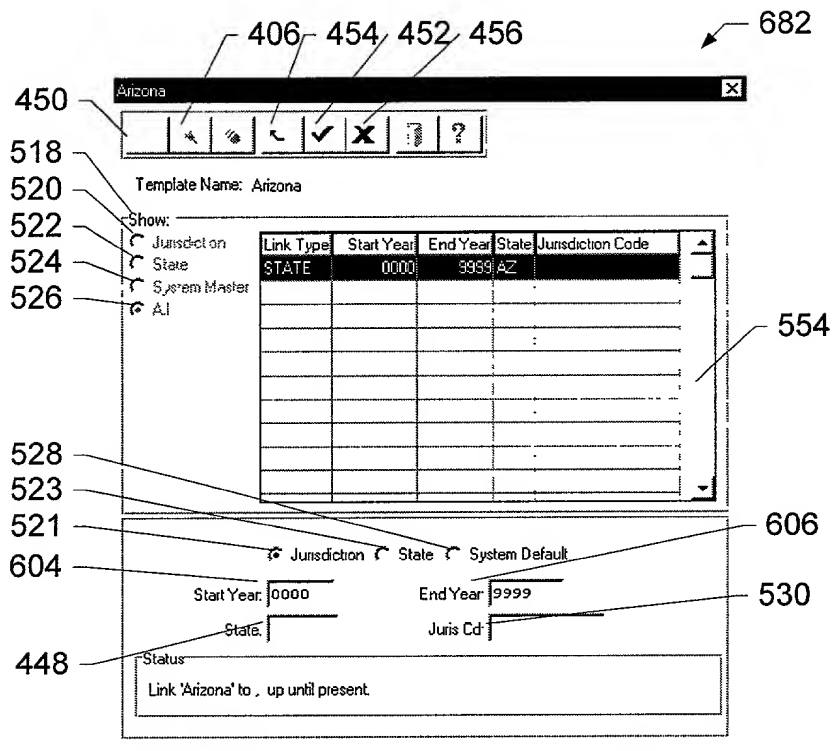


FIG. 36 Installment Templates Link To

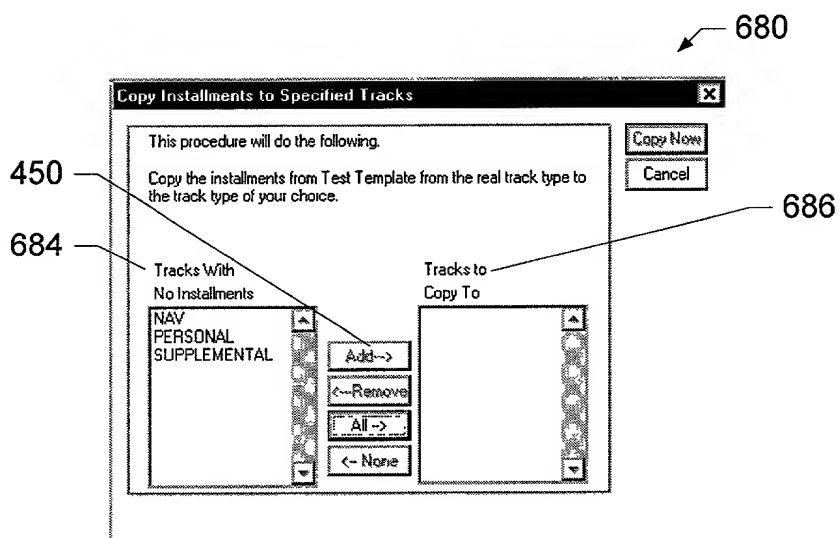


FIG. 37 Copy Installments Dialog Box

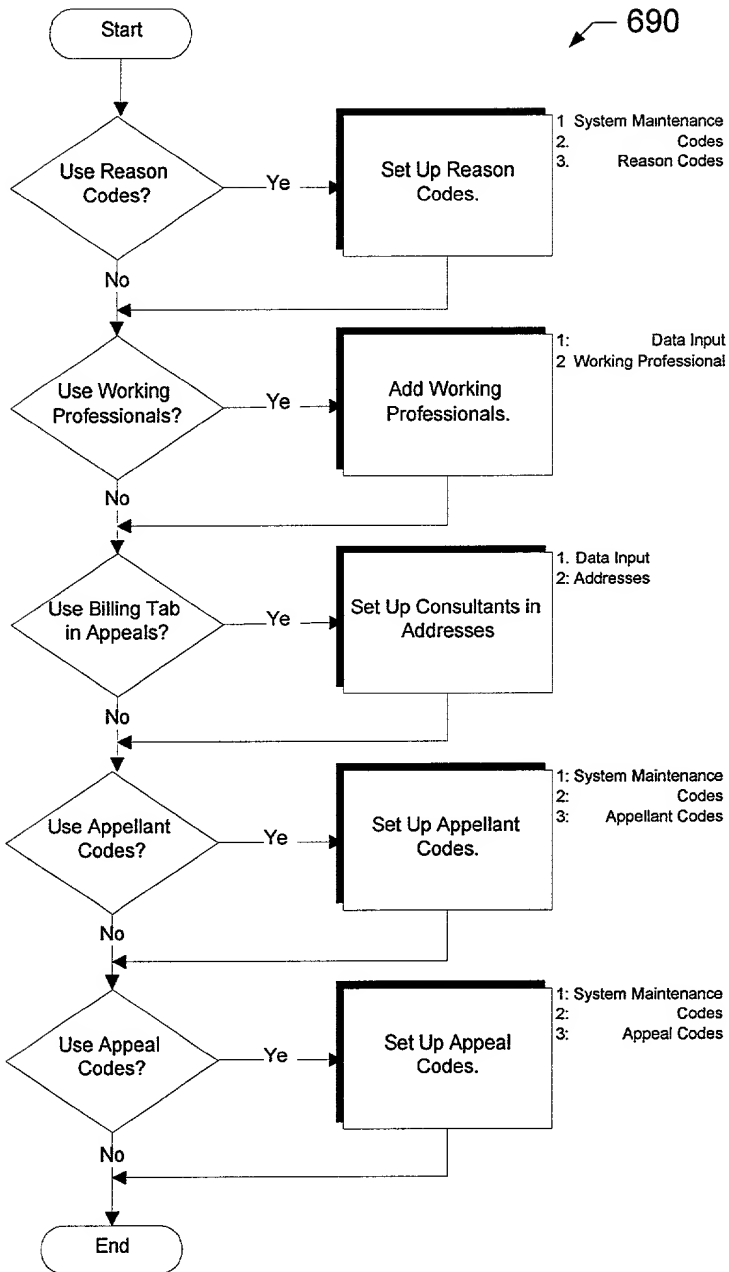


FIG. 38 Appeals Set Up

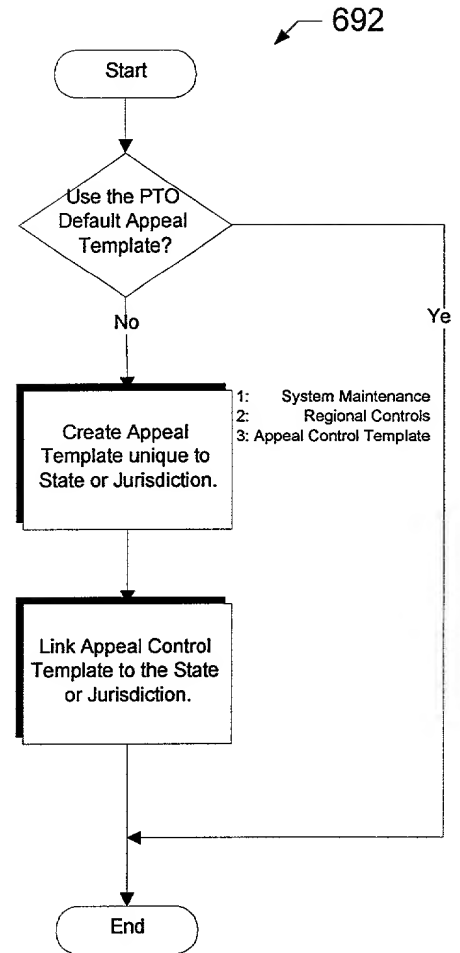


FIG. 39 Appeal Control

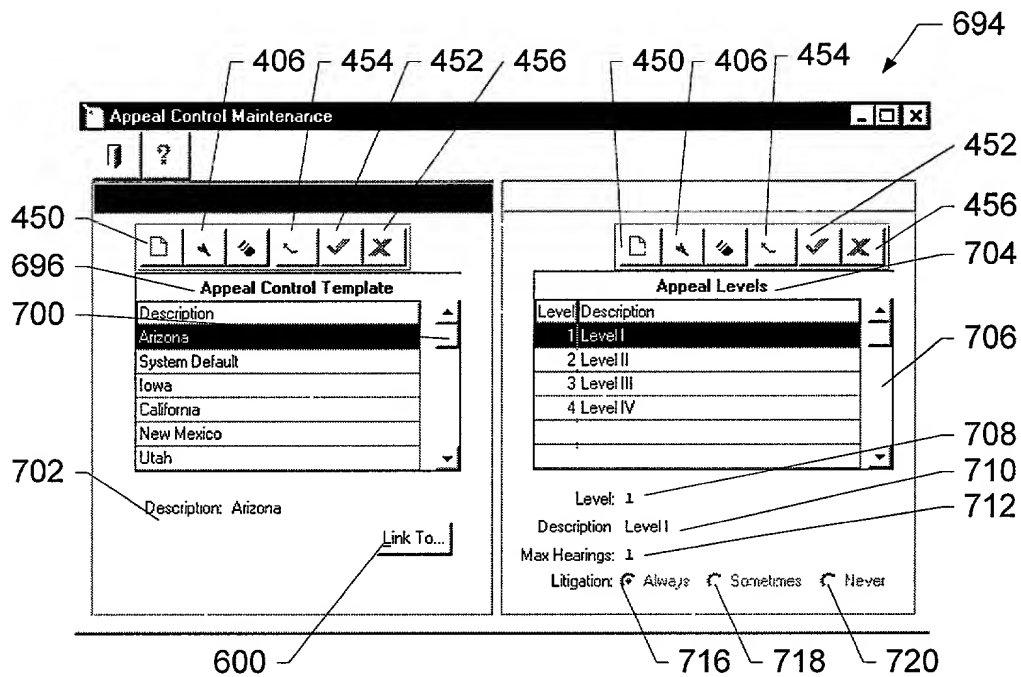


FIG. 40 Appeal Control

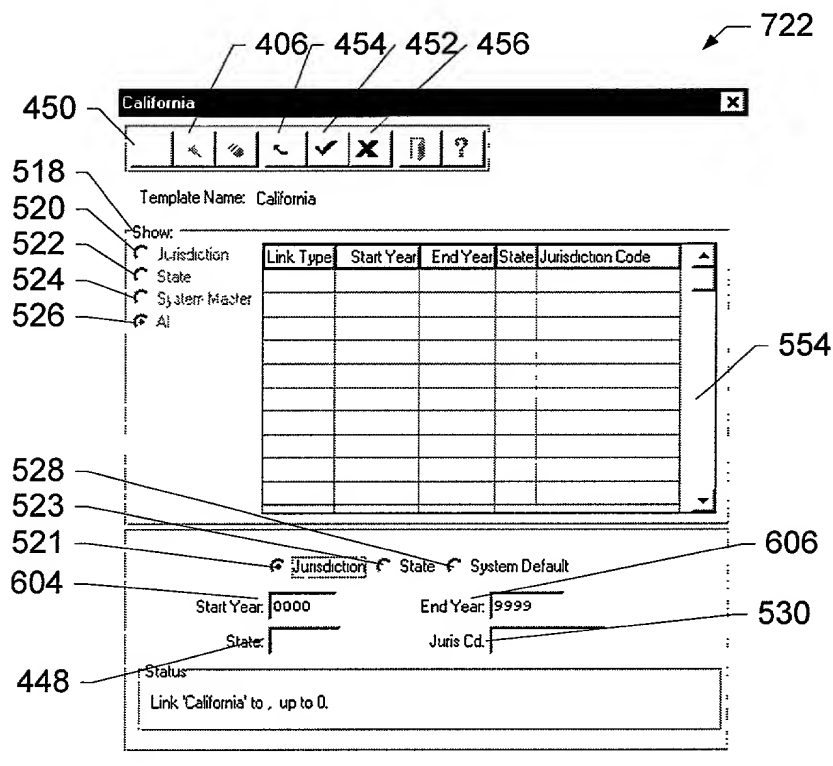


FIG. 41 Appeal Control Link

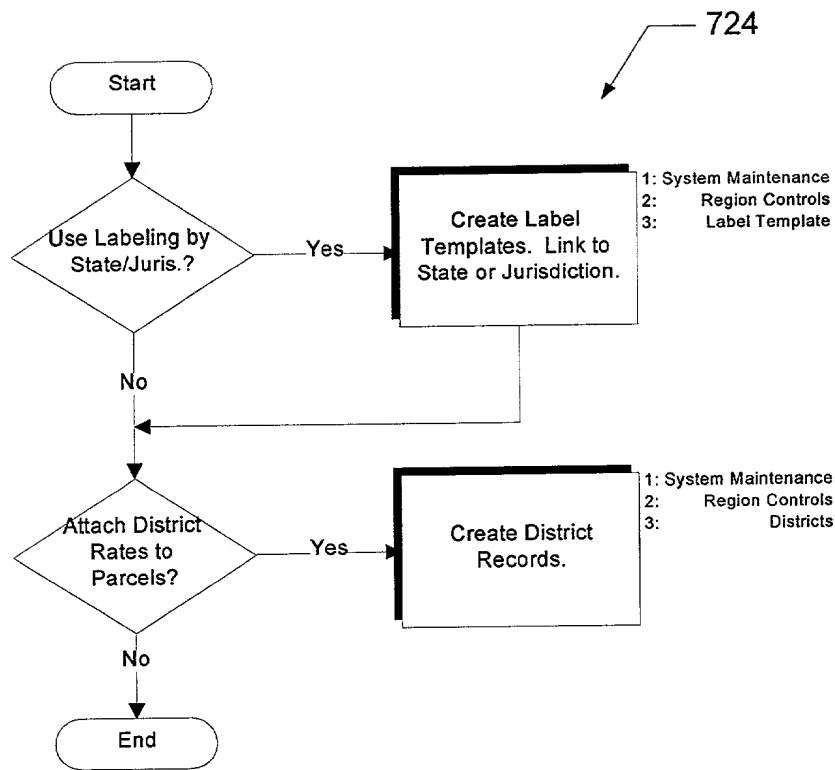


FIG. 42 Dynamic Labeling and Districts

726

730

731

734

732

736

740

728

600

Label	New Label
Asd OV	Asd OV
Asd TV	AV
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Decision OV Ratio	Decision OV Ratio
Decision OV Ratio	Decision OV Ratio
OV	OV
OV Dst Tax Rate Use	OV Dst Tax Rate Use
OV Dst Tax Rate Use	OV Dst Tax Rate Use
OV ER Treatment	OV Eq Mult
OV ER Tmnt	OV Eq Mult
OV Increase	OV Increase

FIG. 43A Label Template

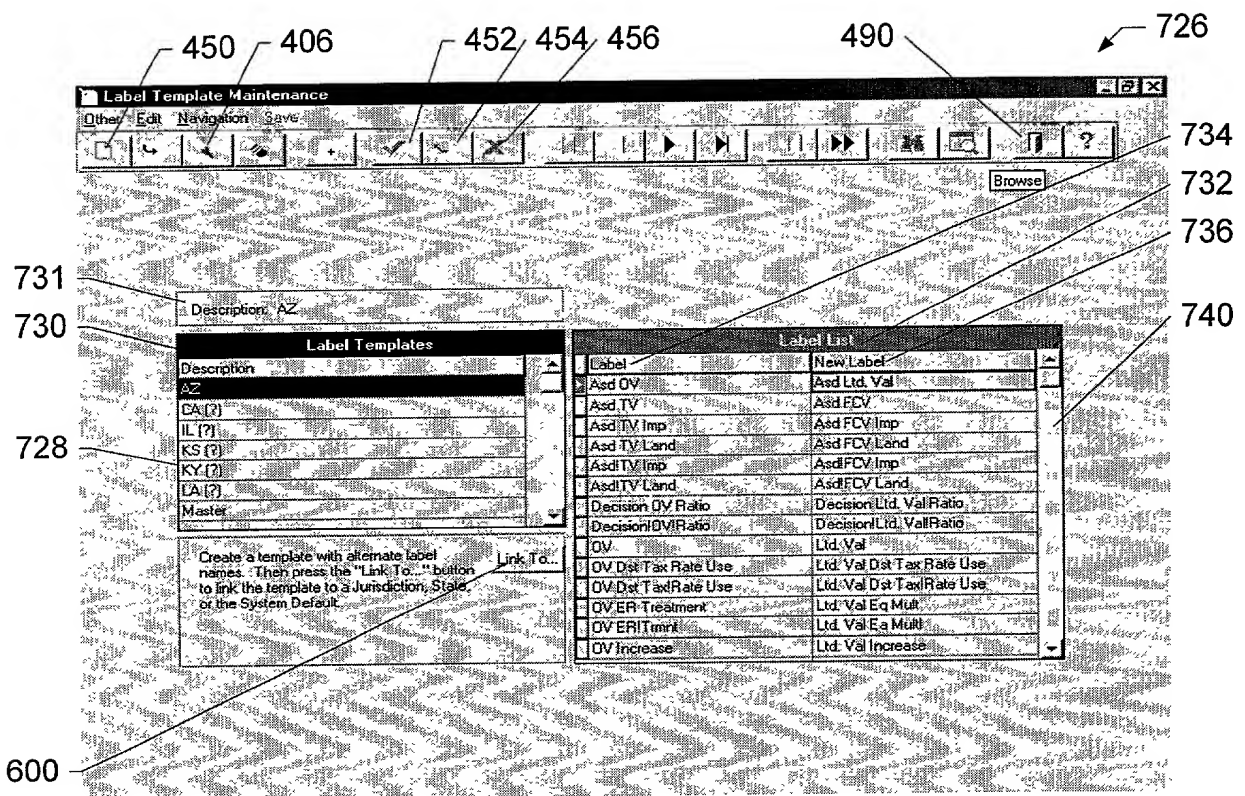


FIG. 43B Label Template

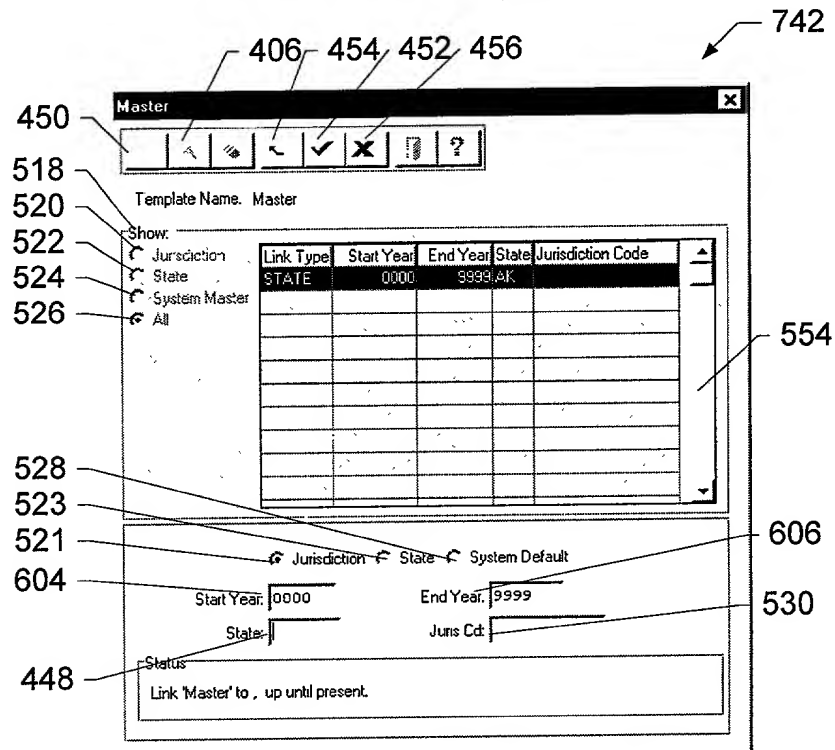


FIG. 44 Label Template Link To

744

Dist Code	Classification	TV Rate	DV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

762

456

454

746

Dist Code:      Class:      [Add] [Edit] [Delete]

748

Dist Code: [ ] Description: [ ]

750

Class: [ ]

756

TV Rate: [0.000000]

752

DV Rate: [0.000000]

758

☐ Special District

760

Type: [ ]

754

Use in Update?: ☒

FIG. 45 - District Set Up